How to email Payroll Statements

*** Prior to beginning payroll, you must first enter email addresses for all employees that wish to have their statements emailed to them. These addresses should be entered into the Vendor file under the "*Other Info*" tab. ***

*** This document will only cover the setting up and emailing of statements during the *Payroll Posting* stage; if you are unfamiliar with the "*Do Payroll*" menu, please see our "*How to do Payroll*" guide. ***

Setting up/Testing:

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- **01.** Log onto District Finance.
- 02. Click on the Payroll tab.

03. Click on the Load Payroll Menu button. The following menu will appear as seen below:

	T .	I	District Finance Plus	an antara Antarasi.	
0/05/2015 9:39:13 AM	C.		Demo Fire District		Tel:(631)493- Fax:(631)486-
vroll Main Menu Par: 2015	F1-Task Notes F2-QuickHelp		🗖 Menu Help	Date	of Last Backup: 10/04/2
Payroll	Schedule			Notes	Exit
C	Data Input		Standard Reports		
	Do Payroll	Tax Tables	General Payroll Reports/Other	Op	itimize Payroll
Direct [Deposit/EFTPS/etc	Employee Cert/Other Tables	Certifications Due List	Refresh	Finger Reader Data
Emp	oloyee Records	Group Insurance	Time Cards		
Payr	oll Other Options	3th Party Import for NYS Retire Rep	Timesheets		
			Attendance Time Check	Test	Post Pay Email
Daily	Timesheet Input		W4		

04. Click on the **Test Post Pay Email** button. The **Post Payroll** menu will appear as seen below:

roll Time Out: 0:59:52							
					Statements		
Account					Employee Attendance Credit Report		
CCT 1	- 1						
					C Only individuals receiving	ng pay, sick etc	
					C All Direct depositors on	ly	
ssue Withholding Payment Options				C Direct depositors receiv		ing pay, sick etc	
🔽 Federal Tax					C Labor Law Section 195(3	3)	
I⊽ NYS Tax					C Labor Law Section 195(3	3) 2 copy	
					C With added Ind. payroll	remarks	
					Statements	OK	
Other Deductions 1st				Print C Email Also Print	Tost amail		
			0				
Take Federal Credit: \$				Other Posting Options			
Take NYS Credit: \$				Disable Posting To General Ledger			
	-			Disable Check Writing			
				Disable Posting to Payroll			
					Reestblish Direct Deposit	Make Prepaid Test	
use Check Writing	Display Check - Manual Print						
POST/WRITE	CHECKS			POS	ST DIRECT DEPOSIT	View Warning	
ENDLOYEES		DD R	eport Pending		DD Report Current	CH Multi 10 Format	
EWIPLOTEES	WITHHOLDINGS	Clear Pen	ding from Direct	Ada	d Current to Direct Deposit		
Post & Print Pay Checks	Post & Print Checks	De	posit File		File	Total Direct Deposit Report	
(5)	6)		()		8	9	
ı print Statements (Step 4) - always	do Step 4 before Step 5.						
						eXit	

05. The default setting for Statements is "**Print**" (as seen in the above image); click on the **Email** option and the following menu will appear:

			- Statements			
Account Server SMTP (ame	Employee Attendance (mployee Attendance Credit Benort		
			© All	• All		
	Server SMTP Po	ort	C Only individuals receivi	na pav sick etc		
	1 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1	Server Requires SSL		·········		
	Server User Id		C All Direct depositors on	iy		
sue Withholding Payment Options			C Direct depositors recei	ving pay, sick etc		
Federal Tax	Server SMTP Pa	ssword	C Labor Law Section 195(3)		
V NYS TAX			C Labor Law Section 195(3) 2 copy		
	From Email Addr	ESS Use PIPS EMAIL	C With added Ind. payroll Statements	remarks		
☑ Other Deductions 1st			C Print	Test email		
Take Federal Credit: \$			Other Posting Options			
Take NYS Credit: \$			Disable Posting To Gener	al Ledger		
			Disable Check Writing	2		
			Disable Posting to Payroll			
				Maka Propoid Test		
			 Neesibiish Direct Deposit 	i Make Prepaid Test		
use Check Writing 📃 Display Check	- Manua					
POST/WRITE CHECKS	Add Co	noral Noto	ST DIRECT DEPOSIT	View Warning		
	Adu de		DD Report Current	ACH Multi 10 Format		
EMPLOYEES WITHH	OLDINGS -	Closer Ponding from Direct	Add Current to Direct Depecit			
Post & Print Pay Checks Post & F	Print Checks	Deposit File	File	Total Direct Deposit Report		
5	6	1	8	9		
print Statements (Step 4) - always do Step 4 befo	re Step 5.					
				eXit		

*** Please note that the fields in the above menu are blank; once information is entered, District Finance will remember those settings. ***

06. In the Server SMTP Name field, enter your email server. Common email account servers:

- a. GMail smtp.gmail.com
- **b.** OptOnline mail.optonline.net
- c. Yahoo smtp.mail.yahoo.com

*** Please note that if you use a different email account, you can search online for your settings. ***

- **07.** In the *Server SMTP Port* field, enter the port that your email server uses. Common email account server ports:
 - **a.** GMail 465
 - b. OptOnline 25
 - *c.* Yahoo 465
- **08.** If your email server requires SSL, select the checkbox to the right of the **Server Requires SSL** label. Common email account servers:
 - *a.* GMail Yes *b.* OptOnline No *c.* Yahoo Yes
- 09. In the Server User ID field, enter the ID of the email account.
- 10. In the Server SMTP Password field, enter the password of the email account.
- 11. In the From Email Address, enter the email address from which the emails will be sent.

*** Please note that this address must be the same account for which the above information has been entered. ***

***Please note that you have the option to select "*Use PIPS Email*" which is a backup account in the event that your credentials are not working or due to other firewall-related issues. In order to use this option, you must enter <u>pipsfiredistricts@gmail.com</u> ***

12. When all of the fields are populated, the menu should appear similar to the image seen below:

rroll Time Out: 0:45:09		Statements
Account	Server SMTP Name	Employee Attendance Credit Report
SCCT 1	Simplify SMTD Date	· ⊂ All
	465 Server Requires SSI	Only individuals receiving pay, sick etc.
	Server User Id	C All Direct depositors only
ssue Withholding Payment Options	pipslink	 Direct depositors receiving pay, sick etc
🔽 Federal Tax	Server SMTP Password	C Labor Law Section 195(3)
I NYS Tax	*****	C Labor Law Section 195(3) 2 copy
	From Email Address	EMAL C With added Ind. payroll remarks
	pipslink@gmail.com	Statements
☑ Other Deductions 1st		C Print C Email ☐ Also Print Test email
□ Take Federal Credit: \$		Other Posting Options
□ Take NYS Credit: \$		Disable Posting To General Ledger
		Disable Check Writing
		Disable Posting to Payroll
		T Reestblish Direct Deposit T Make Prepaid Test
use Check Writing 🗾 Display Check	- Manua	
POST/WRITE CHECKS	Add General Note	Sanal View Warning
EMPLOYEES WITH		DD Report Current CACH Multi 10 Format
Dest 9 Deit Deu Charles Dest 9	Clear Pending from Direct	Add Current to Direct Deposit
POST&	Deposit File	File File
(5)	(7)	(8)
print Statements (Step 4) - always do Step 4 befo	pre Step 5.	eXit

13. Click on the Test email button. The following prompt will appear:

			- Statements -			
Account	Server SMT	IP Name	Employee	Attendance Credit F	Report	
OCT 1	smtp.gmail.c	smtp.gmail.com				
	Server SMT	Server SMTP Port C Only individuals receiving			a pav. sick etc	
	465	Server Requires SSL	C All Direct	donocitore only		
	Server Use	Server User Id Child Direct depositors on pipslink Server SMTP Password Chabor Law Section 195(iy	
ssue Withholding Payment Options	pipslink				ving pay, sick etc	
Federal Tax	Server SMT				J)	
V NYS IAX	email test address	il test address				
				d Ind. payroll remark	(\$	
	Send		Close			
Other Deductions 1st			Also Print	• Email	Test email	
To Take Factured Condition			Other Desting	Ontions		
			Outer Posting	opuons		
Take NYS Credit: \$			C Disable Po	osting To General Ledge	er	
			🗆 Disable Ch	ieck Writing		
			T Disable Po	osting to Payroll		
			T Reestblish	Direct Deposit	Make Prepaid Test	
use Check Writing 👘 Display	(Check - Manua					
POST/WRITE CHE	СКЗ		T DIRECT	DEPOSIT	View Warning	
	Ac	ld General Note Car	icel		CH Multi 10 Eormat	
EMPLOYEES	WITHHOLDINGS		DD Report Cu	ment		
Post & Print Pay Checks	Post & Print Checks	Clear Pending from Direct	Add Current to Dire	ct Deposit T	otal Direct Deposit Report	
5	6		File	8	9	
u print Statements (Step 4) - always do Ste	in 4 hefore Step 5			U	0	
	p				eXit	

14. Enter the email address to whom you wish to send the test email.

15. Click on the Send button.

***Please note that if there is an error in the specs that have been entered, an error message will appear. If a message appears telling you that the email has been sent, the specs have been entered properly. Should the email not reach the intended recipient in the latter event, please try "*Use PIPS Email*." If the email still does not reach the intended recipient, please consult with your network/IT company in order to troubleshoot any firewall or similar issues. ***

Emailing statements during the Post Payroll process:

- **01.** Follow all normal payroll procedures until you get to the printing Statements part of the process.
- 02. Click on the *Email* radio button.
- 03. If you would like to print out paper copies of the Statements as well as emailing them, select the "Also Print" checkbox.
- **04.** Click on the **OK** button to the right of the **Email** option to begin emailing the Statements. Once this process has started, the large field below the **Password** will begin to show the status/activity of the emailing/printing.

*** Please note that should an email be entered incorrectly or other internet connectivity issues, the activity log will note that there was an error and the Statement for the individual(s) will be printed instead. ***

05. Once all of the Statements have been emailed/printed, the menu will look as follows:

Payroll					
			Statements		
Accour	nt 🚺		Employee Attendance Credit Report		
GF Checking			• All		
	Ema	il task completed click here to clos	C Only individuals receiving pay,	sick etc	
Start Unecks at Uneck Number	19142		C All Direct depositors only		
Jacus Withholding Boumont Options			 Direct depositors receiving pay 	, sick etc	
Federal Tax		View/Print Report	C Labor Law Section 195(3)	C Labor Law Section 195(3)	
✓ NYS Tax			C Labor Law Section 195(3) 2 c	onu	
	No E Addr-	LOYEE 1 Employee 2	- Statements	- Statements	
			C Print • Email	ОК	
			☐ Also Print	<u>I</u>	
🗖 Taka Fadaral Craditi 🕯			Other Posting Options		
			Disable Posting To General Ledger		
			Disable Check Writing		
			Disable Posting to Payroll		
			🔲 Reestblish Direct Deposit		
Pause Check Writing 📃 Disp	lay Check - Manual P				
POST/WRITE CH			ST DIRECT DEPOSIT	View Warning	
		DD hepoter chaing	DD Report Current		
EMPLOYEES	WITHHOLDINGS		,		
Post & Print Pay Checks	Post & Print Checks	Clear Pending from Direct Deposit File	Add Current to Direct Deposit File	Total Direct Deposit Report	
5	6		8	9	
				eXil	

*** Please note that in the above example Employee 1 has an email address in the system but Employee 2 does not. ***

06. At this point you have two options:

a. Exit the email menu by clicking on the large red button or

b. Viewing/Printing the Email Status report by clicking on the large blue button labeled as such. After Viewing/Printing the report you would then perform the first option to continue Posting Payroll.